

# California Integrated Service Delivery Initiative Local Planning Components and Template December 2007

## Summary and Background

At the October 10, 2007 meeting, the California Workforce Investment Board Administrative Committee approved an Integrated Service Delivery initiative and a draft policy framework to support the development of a demand-driven, skill-based, integrated service delivery model for California's One-Stop Career Center system. The approved policy framework provides a working foundation for the twelve Local Workforce Investment Boards (Local Board) as they embark upon testing effective service integration models using the concept of local One-Stop Career Centers as "learning labs", and for the Employment Development Department (EDD) Workforce Services Branch (WSB) to provide assistance as necessary. This effort is undertaken with the intent to discover more effective ways to deploy staffing and fiscal resources while improving the quality of services delivered to California's workers and businesses through the One-Stop Career Center system.

The integrated service delivery system has three major components:

1. An integrated customer pool which ensures that all customers are registered simultaneously whenever eligibility permits in the performance calculation of specific One-Stop programs;
2. An integrated customer flow that establishes a sequence of demand-driven, skill-based, universal services for all One-Stop customers; and
3. An integrated staffing approach that provides services to the integrated customer pool as they are served through the adopted, integrated customer flow.

In order to approach this effort in a transparent and collaborative manner, the twelve Local Boards, their local Chief Elected Officials, and the WSB have agreed to test integrated service delivery models, learn from these models, and identify policy recommendations, strategies, and operational designs which can be used as the basis for fully implementing the integrated service delivery model throughout California as deemed appropriate. The target date for launching the learning labs is July 1, 2008.

## Local Integration Planning Recommendations

The twelve learning labs have agreed to assume responsibility for planning, designing, and implementing locally integrated service delivery systems in accordance with the State's draft policy framework. As part of the process, each learning lab is being asked to develop and submit a local integration plan to the EDD WSB by February 29, 2008. The local integration plan is intended to help the learning labs capture the design elements which they will use in modeling the

new service delivery system. The integration plans will reflect the parameters of the State's draft policy on integrated service delivery. The State will use the local integration plans to assess the progress of the integration effort, determine if the learning labs are on target to pilot the new delivery system by July 1, 2008; identify potential barriers to implementation, provide technical assistance as necessary; and to showcase ideas and efforts that are enabling learning labs to achieve an especially effective and efficient implementation of new service delivery systems. Ultimately, these planning efforts and experiences are intended to serve as the foundation for statewide implementation of an integrated service delivery system.

### Local Plan Template

To help learning labs develop new systems that are consistent with the State's draft policy on integrated service delivery, the local integration plan template identifies the elements of the draft policy framework and then provides guidance and questions for learning labs to consider in response to each element. In this iteration, the plan represents the first attempt undertaken by the twelve learning labs to document the tactics being used to gain support for and begin implementation of an integrated One-Stop system. These initial plans will serve as a roadmap of the development process and will provide valuable baseline information on the variety of approaches used to achieve the desired result. Detail is encouraged.

At a minimum, learning labs should provide narrative explanations that indicate how they intend to address the elements, describe any existing and potential challenges and strategies for overcoming them; identify promising, innovative or especially effective practices that could be shared with other learning labs; and indicate the degree of partner participation in the overall development of the emerging delivery system.

In completing the template, learning labs are also encouraged to submit attachments, such as lists of functional teams, charts with timelines and milestones, and other documents that have already been developed that will help the State understand how the Local Board has approached this change effort, provide a sense of where the effort is related to accomplishing work that is critical to on-time implementation of new system components or whether technical assistance is needed

### **State Policy Framework Element:**

1. Local Boards will adopt, implement, and continuously improve a demand-driven, skill-based, integrated services plan for the local One-Stop Career Center system. This plan will be developed with significant partner participation.

**Plan Components:**

Briefly describe how the integration initiative was introduced to your Local Board and provide information on the questions, concerns, and discussions held. Provide background information on how your Local Board approved/approached moving forward with the design of an integrated service delivery system. Discuss the degree of interest and support provided by the Local Board, and whenever possible, share plans for keeping the Local Board apprised of the progress made on the local integration efforts. Descriptions of actions that have/will be taken by the Local Board to implement a demand-driven, skill-based, integrated services model for the local One-Stop Career Center system should be provided whenever possible as these practices will provide the information needed to identify best practices for replication.

Provide information on how the One-Stop Career Center partners (i.e. Workforce Investment Act (WIA) Adult, WIA Dislocated Worker, Wagner-Peyser, Trade Act, and Veterans) have been included in the planning process, and how they are represented on any locally established integration leadership teams.

Describe the leadership teams that were developed to support the change effort, their charters, and the information on how the membership of those teams was determined.

Indicate any techniques you identified which enhanced the level of support and cooperation provided by the One-Stop partners (as described above).

Provide information as to how the teams will be used in the learning lab implementation.

**State Policy Framework Element:**

2. As applicable, the local plan will be embedded in all related One-Stop Career Center system documents, including Memoranda of Understanding, One-Stop Operator agreements, and contracts for service providers.

**Plan Components:**

How will you anticipate incorporating the language of the integrated service delivery model policy framework into your existing agreements?

Indicate whether you will revise existing agreements or create addendums to agreements for meeting this requirement. To the extent possible, identify which agreements will require revisions to incorporate integrated service delivery system language.

Where do you foresee challenges that may delay the timely execution of these agreements?

Include an estimated timeline for agreement approvals.

**State Policy Framework Element:**

3. One-Stop Career Center service design will be driven by the local economy and employer needs, and draw on quality workforce intelligence, local labor market information, and local employer validation of data.

**Plan Components:**

Describe what methods you will employ to assess the local economy and employer needs.

How will you validate the information gathered in this process, (e.g., workforce intelligence and related labor market information)?

Once you have completed the data collection and the information gathering process, how do you anticipate your discoveries will influence your approach to system integration and service delivery?

**State Policy Framework Element:**

4. One-Stop Career Center service design will emphasize skill assessment, skill enhancement, and skill-based labor market attachment for all Center customers, with the goal of transforming job seekers into even more competitive job candidates.

**Plan Components:**

How will the One-Stop Career Center service design enhance your local system's ability to effectively link qualified job seekers with employment opportunities that best match their skills?

If you have made or intend to make changes to the design of office space and/or your policy and procedure manuals, please provide information on the nature of the changes and how you believe they will improve the delivery of services or integration of staff.

How will you assess the skills and needs of job seekers? Where will this occur and what staff will be tasked with this function?

If new tools and systems are being introduced, describe your plan for training functional teams in the use of the tools/systems.

**State Policy Framework Element:**

5. This service design and all services will be available at all locations within the local One-Stop Career Center system.

**Plan Components:**

Describe your strategy for ensuring that the integrated service delivery model you have designed will be consistently implemented throughout the local area.

Provide a list of One-Stop Career Center locations and other service points in your area where the integrated service model will be implemented. If you are phasing in implementation, please provide a timeline?

**State Policy Framework Element:**

6. Integrated service delivery has the following three major components which are to be incorporated into each locally developed plan.
  - a) A commitment to and a process for an integrated customer pool, so that all One-Stop Career Center customers (whenever eligibility permits) are registered simultaneously in the performance measure calculation of the Workforce Investment Act, Wagner-Peyser Act, Trade Adjustment Assistance, and Veterans Employment and Training programs.

**Plan Components:**

Implementation of an integrated customer pool requires an automated reporting system. This system must provide for a single participant record that can be accessed and updated by staff with the required customer information and services provided, regardless of the funding stream supporting the activity. Duplicate data entry should be avoided and data must be transmitted to the EDD Workforce Services Division in compliance with federal and state reporting requirements.

It is the decision of the local level to decide which of the following three automated case management systems to use to meet the requirements.

1. A combination of CalJOBS<sup>SM</sup> (and the associated subsystems) and the Job Training Automation (JTA) System.
2. A locally developed system that will upload data to JTA in accordance with federal and state reporting requirements. This local reporting system must provide for collection of the full range of data required across all the integrated programs.
3. A combination of CalJOBS<sup>SM</sup> and a locally developed client management system. This local reporting system will provide for collection of the full range of data required across all the integrated programs. Data will be uploaded to the JTA system for reporting in compliance with federal and state reporting requirements.

In order to assure an accurate unique count of customers entering the One-Stop, a single reporting option must be selected by the local partnership. Please indicate the option your local partnership has selected and describe how it will be implemented throughout the One-Stop Career Center system.

How have you designed the flow of customers through your One-Stop Career Center system to assure that all clients will be reported? In order to ensure reliability of the data collected under universal reporting requirements, all One-Stop Career Center customers (self-service and staff-assisted) must be captured through the identified reporting option.

Adult Common Measures outcome goals will be negotiated for the integrated customer pool. Although negotiations are not required at this phase of the planning process, if your partnership has discussed expected entered employment, retention, and average wage levels for the common customer pool please provide some background on that discussion, and what the partnership's recommendation was for performance levels.

Federal Regulations describe when and under what circumstances a Governor may request revisions to negotiated levels. For the Learning Labs it is important to note that these circumstances include significant changes in economic conditions, in the characteristics of participants entering the program, or in the services to be provided from when the initial plan was submitted and approved.

If recommended performance goals have been developed, please describe the method used for determining these levels and any historical data used to evaluate performance expectations for the common customer pool.

**State Policy Framework Element:**

- b) An integrated customer flow that clearly defines a service delivery process with a sequence of demand-driven, universal services that focuses less on specific program eligibility and participation.

**Plan Components:**

Describe the integrated customer flow you have designed and provide information on how it will offer all customers three types of services, including (1) an initial, standardized skill assessment from which an initial service plan is designed; (2) a robust menu of demand-driven, skill enhancement products (including, but not limited to, occupational training); and, (3) a method for attaching center customers to the labor market by responding to employer qualifications and, whenever possible, verifying skills prior to referral of job candidates to employers.

Please discuss which skill assessment tool(s) the learning lab will use, how and why the tools were selected and what skill enhancement products that the learning lab will offer. How will your system approach determining employer skill requirements and preparing job candidates for referrals based on those requirements?

**State Policy Framework Element:**

- c) An integrated staffing chart to lead and provide services to the integrated customer pool as they are served through the adopted, integrated customer flow. Include in this discussion your considerations for continuous quality improvement for this flow to reflect the changing needs of your customers based on ongoing workforce intelligence.

**Plan Components:**

Describe how you approached the creation of cross-functional service delivery teams. Indicate who has responsibility for functional supervision, management and staffing functions for the new service delivery model.

What challenges were encountered during the planning process?

What mechanisms have been implemented to encourage early identification of ineffective practices, problem resolution and continuous improvement based on the intent of this initiative to support learning as the model evolves?

How will the functional teams provide services under the adopted customer flow, with affiliation by team and not by program funding? How were the managers and team leaders of this effort named? Note: The managers and team leaders should be named without regard to funding source and should coordinate the functional teams in the implementation of the integrated flow.

**State Policy Framework Element:**

- 7. All local One-Stop Career Center systems will have an integrated, employer services team that has responsibility for connecting local employers to the local One-Stop system. This team also has as a major function ensuring that all One-Stop services continuously improve and respond to the needs of local employers and the local economy.

**Plan Components:**

What is the composition of your employer services team? Describe the methodology used in building teams to promote the services of the One-Stop Career Centers in the local community.

What will be done to build relationships with the local business community for the purpose of establishing ongoing employment opportunities for One-Stop customers? Whenever possible, please provide some examples of actual activities that are representative of the tactics used in serving the business customer.

**State Policy Framework Element:**

8. Local Boards will identify clear success indicators to evaluate the shift to a demand-driven, skill-based integrated service delivery system and include those metrics in their local plans.

**Plan Components:**

How do you propose to document the success of your integration effort? What indicators will you use to communicate to your Board, staff and customers the effectiveness of your model? Describe the benchmarks that will be used to validate the level in which the learning lab has successfully shifted to the integrated service delivery model and describe the methodology you will use to calculate your results.

What indicators will you compare as you evaluate your new model against past practice? Items that you may consider including are impact on service quality, ease of data collection, increased efficiencies and effectiveness, impact on performance outcomes, sufficiency and identification of resources to meet the responsibility, increase in the number of customers receiving skills and other training, impact on cost per customers served, and the impact on duration of unemployment. How will these indicators assist you in evaluating your new model?